

What Happens to Your Proposal After it is Submitted?

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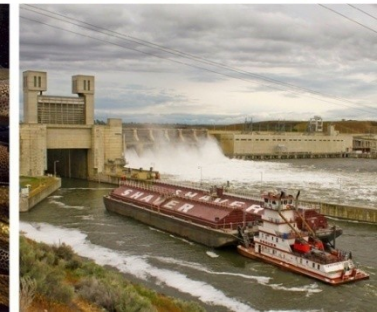
Contracting Officers

Walla Walla District USACE

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**US Army Corps of Engineers
BUILDING STRONG**



Objectives

- Better understanding of the **Source Selection Process**
- Know the **Key Players** involved in the Source Selection
- Tips on **Preparing Your Proposal**
- Take advantage of **Lessons Learned**



Source Selection Process Overview

- Pre-Solicitation Activities
- Issue Solicitation
- Receive & Evaluate Proposals
- Award on Initial Offers (Decision Point)
- Develop Competitive Range
- Conduct Discussions
- Receive & Evaluate Final Proposal Revisions
- Award
- Debriefings



Conduct Market Research

- **Sources Sought Announcement**

- ▶ General announcement of the requirement published on FedBizOpps www.fbo.gov/
- ▶ Tool used to identify potential sources with the capacity to accomplish the work (*see example*)

- **SBA Dynamic SB Search website**

- ▶ Identify contractors through NAICS, location, type

- **Small Business Program Manager**

- ▶ Identifies capable small business concerns



Review of Market Research

- All responses to the Sources Sought are analyzed by Technical personnel and findings are documented in writing
- Contracting Officer makes determination whether or not to set aside the acquisition for small business based on analysis of responses

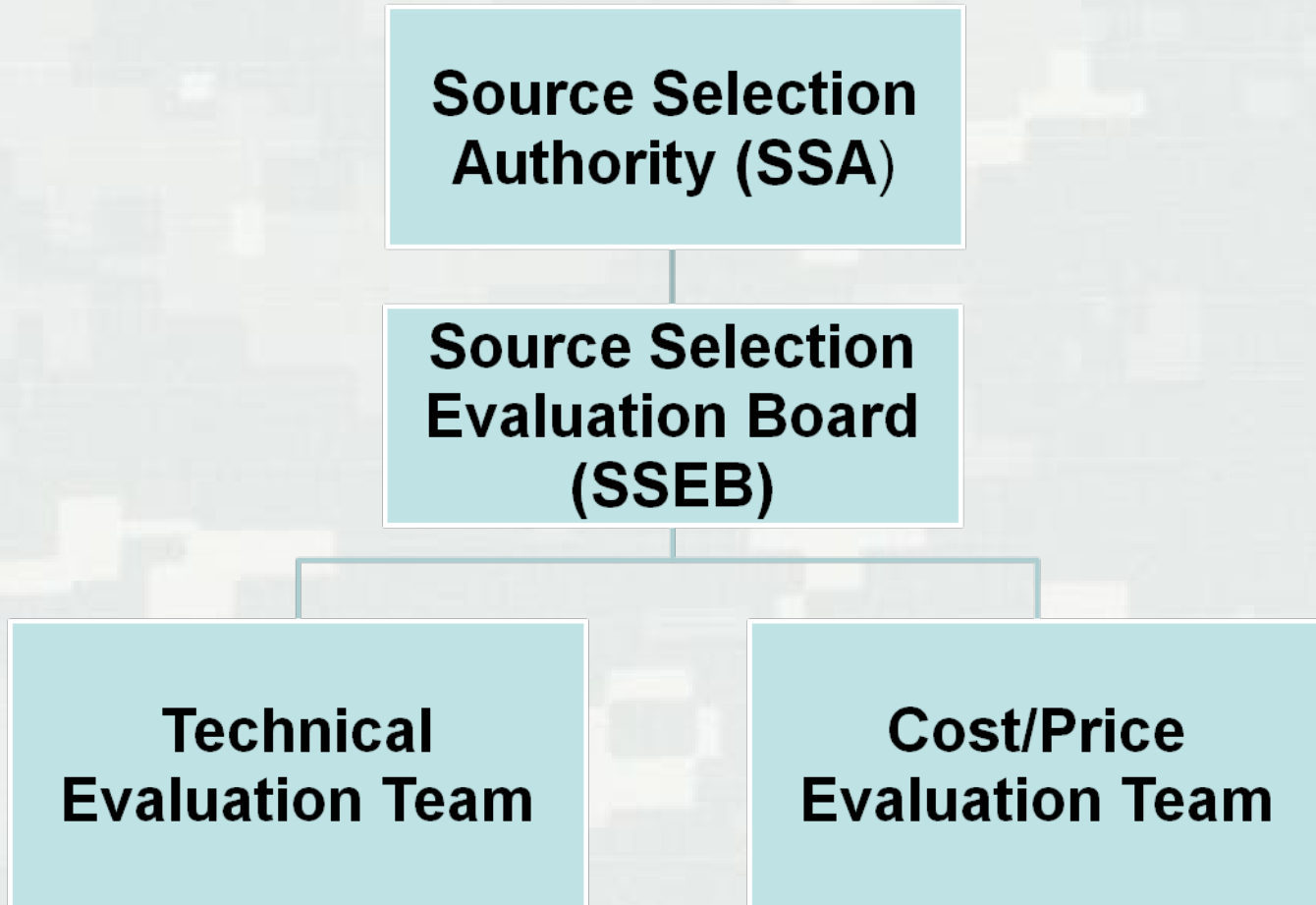


Pre-Solicitation

- **Develop Acquisition Plan**
 - **Determine Source Selection Method**
 - **Lowest Price Technically Acceptable (LPTA) (Acceptable/Unacceptable)**
 - **Tradeoff (Outstanding to Unacceptable)**
 - **Develop Evaluation Criteria**
- **Prepare Solicitation & Source Selection Plan**
 - **Establish Source Selection Team**
 - **The Source Selection Plan is not a releasable document**



Source Selection Team



Roles & Responsibilities

Source Selection Authority (SSA)

- ▶ Often the Contracting Officer (KO)
- ▶ Ensures process conducted properly
- ▶ Ensures Source Selection Plan and Evaluation Criteria are consistent with solicitation
- ▶ Selects Best Value Offer



Roles & Responsibilities

Contracting Officer

- ▶ Point of contact between Gov't and Offerors
- ▶ Determine Offerors in the Competitive Range
- ▶ Conduct discussions with Offerors
- ▶ Close Discussions/Call for Final Proposal Revisions
- ▶ Award Contract
- ▶ Chair debriefings of Offerors



Roles & Responsibilities

Source Selection Evaluation Board **(SSEB)**

- ▶ Conduct comprehensive review & evaluation of proposals against solicitation requirements and evaluation criteria and assign a rating
- ▶ Document deficiencies and basis of evaluation
- ▶ Identify necessary items for discussion
- ▶ Provide information to KO supporting debriefings of unsuccessful Offerors



Proposal Submission Instructions and Evaluation Criteria

- ▶ The Request for Proposal will contain:
 - Instructions to Offerors
 - Information required to be submitted by Offerors
 - Evaluation factors (and sub factors when applicable) (See example)



Ratings for Non-Price Factors

Lowest Price Technically Acceptable

- Acceptable
- Unacceptable



Acceptable

- Technical
 - ▶ Proposal clearly meets the minimum requirements of the solicitation
- Past Performance – (See Past Performance Questionnaire)
 - ▶ Based on the Offeror's performance record, the government has a reasonable expectation the Offeror will successfully perform, or the Offeror's performance record is unknown



Unacceptable

- Technical
 - ▶ Proposal does not clearly meet the minimum requirements of the solicitation

- Past Performance
 - ▶ Based on the Offeror's performance record, the Government has no expectation that the Offeror will be able to successfully perform the requirement



Deficiency

- A **material failure** of a proposal to meet a Government requirement. A deficiency **must be corrected** for a proposal to be considered for award.
- Examples:
 - Taking exception to delivery/performance schedule
 - Taking exception to a required contract clause



Award on Initial Offers

- Government's preference
- No discussions
- Provide your best offer up front



Competitive Range

- When cannot award on initial offers
- Discussions are necessary
- Technical & price proposals are considered
- Contracting Officer makes determination of which proposals to include or exclude from the CR
- Determination is documented in writing
- Eliminated Offerors are notified in writing – proposal revisions will not be considered
- Competitive Range can be further narrowed after discussions



Discussions

- Conducted with Offerors in the Competitive Range
- May be written, oral or both
- Discuss
 - ▶ Adverse Past Performance
 - ▶ Deficiencies/Weaknesses/Strengths
 - ▶ Price – i.e., relationship to IGE – Too High or too Low
 - Clear understanding of the scope for the CLIN?
- May not be the same for each Offeror
- Concludes with request for Final Proposal Revision



Final Proposal Revision

- Common cut off date and time for all Offerors in the Competitive Range
- Late Proposal provisions apply
- All revisions are evaluated and ratings adjusted accordingly, if merited



Award Notification

- Send letter to Successful Offeror
- Post on FedBizOpps
- Post to Facebook Page
- Send letters to unsuccessful Offerors
- Invite Offerors to request Debriefing

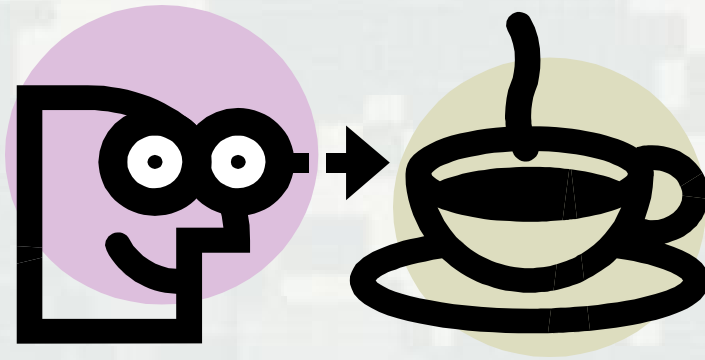


Questions about solicitation process?



Break Time !

15 minutes please.



Tips to Offerors ---

Selecting Projects to Include in Your Proposal

- Read the Project Description and Evaluation Criteria – select projects based on similar attributes
- Provide experience that demonstrates abilities that meet the minimum requirements in size, scope and complexity
- Projects that demonstrate teaming relationships with your proposal team
- Refer back to the evaluation criteria in RFP



Project Experience

- Identify Key personnel (when applicable) who worked on the project – Are they on the team?
- Don't overstate your involvement in the project
- Provide information in concise statements
- Provide all information required – excessive information beyond the requirements does not add value



Relevancy of Experience

- Relevant to the scope of **this** acquisition
- Similar to the instant acquisition to provide indicators of performance
- Consider:
 - ▶ Project Scope or Service Similarity
 - ▶ Complexity
 - ▶ Contract Type
 - ▶ Contract Dollar Value / Capacity
 - ▶ Major or Critical Subcontractors



Technical Proposal Format

- Text boxes
- Use bold, highlighting, etc. to focus the reader's eyes
- Readability
 - ▶ Clear, concise, succinct
 - ▶ Break lines into shorter segments
 - ▶ Use of “white space” - can reinforce message
- **Follow RFP instructions on format**



YOU MUST UNLEARN WHAT YOU HAVE LEARNED

- At school we learned how to fill up empty space
- Filling up empty space turned into a compulsion
- The problem is, empty space is needed so that the brain **understands the information**
 - ▶ White space lets the eye “breathe”
 - ▶ White space lets the brain focus on what’s important
 - ▶ White space creates a clean and relaxing visual effect
- When you design, you should use white space
- Too much information dilutes your message
- Don’t crowd the page



Tips on Resumes

- Would you hire the person based on this resume?
- **Address requirements in solicitation**
- State the level of experience with corresponding dates to show the person meets requirements
- Cross reference to past experience sheets



Past Experience vs Past Performance

- Past Experience – What you did
- Past Performance – How well you did it



Organizational Structure

- How does your team work together?
 - ▶ Preventing bottlenecks with subs
 - ▶ Lines of Communication
 - ▶ Who is in control
- Site Safety and Health Officer
- Quality Control
- QC & Safety generally independent of PM



Put your Best Foot Forward

- Proposal is an “example” of
Your Work / Your Company



- ▶ Typos - Grammatical errors
- ▶ Do your tables/charts convey the message you are trying to send?
- ▶ Check your firm's name throughout the document – be consistent
- ▶ Check the project title, especially when copying from another proposal
- ▶ **Answer all stated requirements in the solicitation**



Source Selection Evaluation Boards Can ONLY Evaluate what they see and read!



They grade the paper!



Independent Review

- Have someone outside of the proposal team review your document
- Make a point-by-point comparison between your proposal and the requirements of the solicitation
 - ▶ Does your proposal address every point?
 - ▶ Check experience and training requirements for all resumes



Questions about proposal content?



Trade-Off Ratings, Technical

- **Outstanding:** Proposal meets requirements & indicates an exceptional approach and understanding of the requirements. Strengths far outweigh any weaknesses. Risk of unsuccessful performance is very low.
- **Good:** Proposal meets requirements & indicates a thorough approach and understanding of the requirements. Strengths outweigh any weaknesses. Risk of unsuccessful performance is low.
- **Acceptable:** Proposal meets requirements & indicates an adequate approach and understanding of the requirements. Strengths and weaknesses are offsetting or will have little or no impact on contract performance. Risk of unsuccessful performance is no worse than moderate.



Trade-Off Ratings, Technical

- **Marginal:** Proposal does not clearly meet requirements & has not demonstrated an adequate approach and understanding of the requirements. The proposal has one or more weaknesses which are not offset by strengths. Risk of unsuccessful performance is high.
- **Unacceptable:** Proposal does not meet requirements and contains one or more deficiencies. Proposal is unawardable.



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Trade-Off Ratings, Past Performance

- Past Performance is rated on two aspects in a trade-off acquisition method:
 - ▶ Relevancy
 - ▶ Confidence assessment



Relevancy

- **Very Relevant:** Present/past performance effort involved essentially the same scope & magnitude of effort and complexities this solicitation requires
- **Relevant:** Present/past performance effort involved similar scope & magnitude of effort and complexities this solicitation requires



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Relevancy (cont)

- **Somewhat Relevant:** Present/past performance effort involved some of the scope & magnitude of effort and complexities this solicitation requires
- **Not Relevant:** Present/past performance effort involved little or none of the scope & magnitude of effort and complexities this solicitation requires.



Confidence

- **Substantial Confidence:** Based on the offeror's recent/relevant performance record, the Government has a high expectation that the offeror will successfully perform the required effort.
- **Satisfactory Confidence:** Based on the offeror's recent/relevant performance record, the Government has a reasonable expectation that the offeror will successfully perform the required effort.



Confidence (cont)

- **Limited Confidence:** Based on the offeror's recent/relevant performance record, the Government has a low expectation that the offeror will successfully perform the required effort.
- **No Confidence:** Based on the offeror's recent/relevant performance record, the Government has no expectation that the offeror will be able to successfully perform the required effort.



Confidence (cont)

- Unknown Confidence (Neutral): No recent/relevant performance record is available, or the offeror's performance record is so sparse that no meaningful confidence assessment rating can be reasonably assigned.

